

2018

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J. Michael Thompson

Baylor University, jmichael_thompson@baylor.edu

Carol Seiler

EBSCO Information Services, cseiler@ebSCO.com

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Recommended Citation

Thompson, J. Michael and Seiler, Carol (2018) "Library-Vendor Partnerships – An Overview of Our Symbiotic Relationships," *Against the Grain*: Vol. 30: Iss. 2, Article 9.

DOI: <https://doi.org/10.7771/2380-176X.8035>

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Library-Vendor Partnerships — An Overview of Our Symbiotic Relationships

by **J. Michael Thompson** (Assistant Director for Library Collection Services, Baylor University) <JMichael_Thompson@baylor.edu>

and **Carol Seiler** (Account Services Manager, EBSCO Information Services) <CSeiler@ebSCO.com>



The history of libraries and vendors establishing mutually beneficial partnerships likely extends to the beginning of printed word. Over the centuries, libraries have primarily relied on booksellers to provide printed content to expand their collections. Vendors and libraries still have this collection building relationship, but the digital age has allowed a proliferation of partnership avenues that were not available in the past. Typically, viable partnerships are those that provide mutual benefits that are likely to exceed costs incurred and risks taken. This article will touch on various partnerships that have formed between libraries and vendors and the benefits that result.

Arguably, the modern era of library/vendor partnerships was ushered in by the advent of the approval plan in the early 1960s. Using approval plans, vendors could identify and ship desirable books as they were published by matching the content of the book with computer-based subject profiles that had been previously established with the library. Approval plans seem passé compared to the patron driven, just-in-time access arrangements that many libraries employ today, but the introduction of this type of partnership was radical for its time. Many librarians posited that the approval plans would negatively impact library collections and ultimately harm the profession.

Fortunately, library collections and librarianship fared well with the acceptance and expansion of approval plans. The benefits to libraries of this arrangement included increased delivery speed and decreased operating costs. The plans also benefited book suppliers who received a more predictable income stream based upon the somewhat static profiles. In this case, the benefits outweighed the costs. Once the model was proven, anxiety regarding the health of both the collections and the profession abated.

As electronic resources became the preferred method of content delivery, approval-style plans evolved into patron driven acquisitions models in which patron usage determines purchases. Under these models, libraries pay for titles when a patron “triggers” a purchase by accessing the content. The result is that libraries can provide just-in-time access to useful content instead of building just-in-case collections that might never see any circulation.

Again, some librarians had concerns that library collections would suffer and costs would spiral out of control. In some instances, libraries did end up very quickly running through all the money budgeted for the plan. As a result, libraries and vendors worked together to tweak the plans in ways that decreased the likelihood of over spending. They increased the threshold for purchase triggers, more closely selected the titles available through the plan, allowed libraries to review titles before purchasing, and introduced short-term loans for a predetermined number of initial triggering events.

These measures were very successful at cutting cost, maybe too successful. Publishers and vendors felt that the rates being assessed for short-term loans were cutting into revenues more than was healthy for their finances. As a result, many participating publishers decided to raise the loan rates, institute embargos on new titles (typically 12-18 months before available for short-term loan), or completely disallow short-term loans. With these changes some librarians felt that they had been duped by publishers, while publishers felt that they were making necessary adjustments to stay in business. There are still some hard feelings on both sides of this issue, but the larger point is that vendors were willing to work with librarians on new purchasing models that, like the book approval plans that preceded them, changed the method and means of collection development going forward.

To develop and adjust services like patron driven acquisitions, it is very advantageous for libraries and vendors to find ways to develop partnerships that allow for communication in an open and honest, yet confidential, manner. One such well-established and highly successful informational partnership configuration is the library advisory board. An advisory board is a group of librarians recruited by the vendor to provide reviews and recommendations on the company’s current and future products and services. Members of the boards agree to refrain from outside discussion of the items discussed. Advisory boards can be formed around specific products or online platforms, or they can be more generally applied to the overall business of the vendor. Obviously, the benefit to the vendor is obtaining valuable ideas and feedback from their customers. The participating librarians have the advantage of directly influencing the products and services that will be offered in the future.

Beta testing relationships go beyond the advisory board’s informational model by having libraries collaboratively involved in the development of new vendor products and services. These arrangements are typically initiated by a vendor who is developing a product, for instance a new online platform. The vendor will provide the library with information and access to the product for “real world” testing. The library spends time using the nascent product and providing feedback regarding which aspects are working and desirable, and which features should be altered, revamped, or scrapped entirely. Libraries can also provide enhancement suggestions for missing functionality that could add to the usability of the product.

The process of beta testing requires time and effort on the part of both parties, but the end-results can be products and services that are more useful upon release. Because product development in a competitive environment involves issues of financial outlay and intellectual property, it is customary that a formal contractual agreement is created for the protection and direction of both parties. With the amount of time invested and money at stake, it is always advisable to delineate the exact roles and responsibilities for all participants. No one wants to invest a large amount of time and effort only to experience later disappointment stemming from differing expectations. In addition to the benefits of an improved vendor product, the agreement will often stipulate the financial benefits (i.e., price breaks upon product release) realized by the library as a result of their efforts.

continued on page 18

Transforming Library Vendor ... from page 15

versations and engagements. We all understand that our evolving market includes the introduction of new and innovative business models and we are all actively evaluating trends for viability and new opportunities. We are all in this together.

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While advisory boards and beta testing relationships are initiated by a vendor to help guide their product range, user groups are formed by librarians themselves around a specific provider's products. Two well-known user groups have formed around the library systems provided by **Innovative Interfaces** (the Innovative Users Group) and **Ex Libris** (Ex Libris Users of North America). Like advisory boards, the members of user groups can influence the enhancement of existing products and the development of new offerings. However, advisory boards have a much narrower focus than user groups.

User groups strive to form a community focused on serving the users of a product. As a community, the group will foster communication between members, serve as a clearinghouse for information about the product, and serve as a mouthpiece to bring issues before the company itself. It is not unusual for subgroups to be formed to address specific items of interest regarding the product. Although much of the work typically happens online, user groups often have an annual meeting that draws members together to share information, formulate proposals, and similar activities related to the product.

Although the user group is formed and populated by librarians, a mutually beneficial relationship exists as the group is used as an information conduit between the library and the vendor. Again, vendors will benefit from the input provided by the group regarding their products and services. The librarians can collectively suggest improvement to current products and advocate for future services. The librarians also benefit from the knowledge and experience of fellow members.

The utilization of crowdsourced solutions is another form of partnerships. Crowdsourcing involves a community of creators and users joining together to develop new solutions and/or improve existing ones. An early form of crowdsourcing occurred with the advent of electronic mailing and distribution lists, often referred to as listservs. Listservs gained in popularity with the spread of email communication in the 1990s. Subscribers to the listserv could submit messages and other subscribers would reply with solutions, advice, etc. (LISTSERV is actually the name of a specific product that was originally conceived in the mid-1980s as

Author Bio

J. Michael (Mike) Thompson, Assistant Director for Library Collections Services at **Baylor University**, has served as an academic librarian for the last 18 years. After graduating with an MLS from the **University of Texas**, he began his professional career as the Copy Cataloging Manager at the **University of Houston (UH)** in 2000. In 2005, he moved from Cataloging to Acquisitions at UH and was appointed to head the department in September 2006. He began his current position at **Baylor** during the Spring Term of 2017. **Mike** has presented at the national, state, and local levels throughout his career. He has served on numerous state and national committees, interest groups, etc. He is currently serving as chair of **TLA E-SMART** and as a member of the **LITA 2018 Program Planning Committee**. 🌱

means to automate email list administration. Later generations of the program were utilized widely during the heyday of the electronic mailing list.)

Currently, using crowdsourcing to bring people together has gained wide popularity across society, including among librarians and vendors wanting to address library issues and initiatives. In many cases, these partnerships are informal and inclusive to any who wish to participate. For instance, mashups and hackathons have provided an outlet for partnerships to develop. These short-term groupings aid in fulfilling specific needs. Librarians and others set aside a period of time to work together to resolve issues or develop new products/processes. Often, these groups disband after achieving their agreed upon goal or project.

Vendors are also utilizing online forums to crowdsourcing product develop and information distribution. For instance, **Ex Libris** hosts an online Developer Network which serves as a center for customers (i.e., librarians) and internal developers to submit and retrieve code that enhances API functionality. The network is also used to exchange information and advice about **Ex Libris** products. Allowing libraries to directly interact with data in the system through customizable API functionality and share the solutions with others is tremendously beneficial to the entire community.

While the Developer Network is an effective example of crowdsourcing, it does not represent a shared responsibility for the development of the overall system. There are other groups that are striving to create entire systems through crowdsourcing in an open environment. Integrated library systems such as Koha and Evergreen were created originally by specific groups and are intended to be maintained and enhanced via crowdsourcing.

These systems were developed by partnered libraries who paid developers to create the systems based upon their specifications. Once created, the code of the system was released to the open web. An important expectation of utilizing these systems is to share new developments with the community of users and developers.

In another instance, a group of academic and resource libraries interested in the development of open source tools for libraries decided to band together to form the Open Library Environment (OLE). In 2008, this group began working on an open source library system called **Kuali OLE** which was released in 2014. In 2016, the OLE group decided to shift their efforts toward working with the **FOLIO Community** to create a new open source library services platform.

The **FOLIO** initiative builds upon the direction championed by the OLE group. However, **FOLIO** is differentiated from earlier open source efforts because it was launched with the aid of corporate support through a multimillion-dollar contribution from **EBSCO Information Services**. Although **EBSCO** is providing significant funding support for the project, their ultimate goal is not a proprietary system that they own and control. Rather, the goal of **FOLIO** is similar to that of **OLE**, to partner with libraries and developers to create an open source, multi-tenant library system that permits the introduction of externally-developed modules and applications to enhance and customize functionality via APIs.

EBSCO is not the only commercial vendor supporting this venture. Companies such as **Index Data**, **ByWater BiblioLabs**, and **SirsiDynix** are working with the other members of **FOLIO** by providing seed code, hosting services, product development, and other forms of project support. With the backing of these vendors and various library and development partners, totaling over 20 organizations globally, **FOLIO** is developing quickly with a beta release scheduled for mid-2018.

With the impending release of the beta version, the community is now making efforts to develop an online hub, currently dubbed the **FOLIO Marketplace**, for the exchange of best practices, development ideas, and software applications (both commercially-produced and free of charge). As with the other aspects of

continued on page 19

Author Bio

Carol Seiler, MLS, has been with **EBSCO** as an Account Services Manager for over 11 years total. **Carol** has worked within or for libraries for many years with experience in public, medical, and academic libraries. Most recently she was the Technical Services trainer at the Amigos consortia (creating and providing training as well as online conferences) and prior to that was Associate Director for **Baylor College of Dentistry/ Baylor Health Care System** (a split between a hospital system and a dental school). She is a certified Serials Holdings trainer with **SCCTP** (Serials Cataloging Cooperative Training Program) as well as **CHIS** (Certified Health Information Specialist) with **MLA (Medical Library Association)**. 🌱

FOLIO, the success of the Marketplace will depend upon the support of the participants. Though not all of the wider library community has been convinced of FOLIO's viability, if ultimately successful, the FOLIO initiative could produce a library technology infrastructure that is sustained and allowed to evolve through collaboration and community involvement.

Much like "crowdsourcing," another technological innovation that libraries and vendors can explore together is the manipulation of "big data." The concept of big data involves the analysis of large data sets to reveal patterns, trends, and relationships. As big data technologies mature and research applications are explored, new types of scholarship emerge that did not exist previously. These areas of developing research approaches provide exciting opportunities for library-vendor involvement in the research process.

For instance, the advent of digital scholarship, especially in terms of text and data mining of vendor collections, can allow vendors and libraries to integrate themselves into scholarly research in ways that extend beyond merely providing access to information and instruction on resource use. Access to data sets will allow librarians to work directly with researchers on the formulation of the research question, development of the data extraction plan, manipulation and analysis of the extracted data, and the eventual production of research results by applying data visualization and other presentation applications to the analyzed information. With such an arrangement all parties benefit: vendor content is made more useful, librarians can more fully serve their patrons, and researchers ultimately interpret existing content in new ways.

Though partnerships across the library community are not a new construct, the advent of online technologies has greatly enhanced the ability of the community to collaborate and develop various cooperative arrangements. Not all partnerships produce immediately successful results, however, collaboration has a successful track record of achieving advances that could not have been achieved without willing partners. By engaging in creative acquisition models, collaborative problem solving, cooperative system/product development, and digital scholarship exploration; vendors and libraries have found mutually beneficial ways to serve their patron populations more completely. Partnerships have grown from basic approval plans to online development communities in a relatively short period of time. As technology progresses, library-vendor cooperative arrangements will continue to evolve in form and function alongside it. Future developments may expand partnerships into areas beyond traditional librarianship or it may contract to exclude for-profit institutions or it may continue along the lines being established today. Whatever the future may hold, partnerships will continue to evolve so long as mutual benefit is felt by all partners. 🌱

Conversations: Seeing the Relationship from the Flip Side

by **Ashley Fast Bailey** (MLIS, Director Collection Development and Workflow Solutions, Midwestern and Southeastern U.S., GOBI Library Solutions) <abailey@ybp.com>

and **Laurel Sammonds Crawford** (Head of Collection Development, University of North Texas) <laurel.crawford@unt.edu>

and **Jeffrey Daniels** (Interim Associate Dean of Technology and Information Services, Grand Valley State University) <danielsj@gvsu.edu>

and **Claire Eichman** (MLS, Collection Development Manager, Midwestern U.S.) <ceichman@ebsco.com>

and **Allyson Rodriguez** (Coordinator of Electronic Resources, University of North Texas) <Allyson.rodriguez@unt.edu>

and **Patrick Roth** (Head of Systems and Technology, Grand Valley State University) <rothpa@gvsu.edu>

Information providers such as vendors and publishers have always worked closely with their librarian counterparts in a traditionally customer/vendor relationship. The authors feel that this relationship is more nuanced than many give it credit for. We would also contend that to get the most out of the relationship, both parties need to become more aware of how the other manages this relationship. Yes, libraries are the customer, yes content providers are selling information or services but everyone wants to put the best information in front of the students.

When we are all rowing in the same direction, library users will be successful in their research. Recently, a group of librarians and vendors interviewed each other to get insights into what it's like on the "flip side."

Questions and Answers

Question: *How much of your position is dealing with vendors? How much did you think it would be, and how much is it in reality? And to follow up, what's your ideal amount of time to work with vendors?*

UNT: (Allyson) I thought it would be some (getting quotes, negotiating, contract work, etc.), but in reality it ends up taking up about half of my time or more. This includes emails, calls, etc. The communication happens daily with various vendors. I was very surprised with the amount of interaction with vendors and not being able to do the work behind the scenes.

GVSU: (Jeffrey) I agree with Allyson — interaction with vendors takes up about half of my time. This includes all the little pieces, such as, sorting through all the communication to find the relevant information. That "extra" takes up time.

UNT: (Allyson) A lot of time is spent making sure we aren't missing out on something versus evaluating a resource or going to look for a resource. While we are taking all this time just to get to the relevant infor-

mation (e.g., making sure we aren't missing out on some huge platform change), we could instead be evaluating resources or finding new products for our students. Sorting through everything coming in is not the best use of my time.

GVSU: (Jeffrey) My ideal would be to spend about 25% of my time with vendors. The "extras" can be frustrating. I spend a lot of time going through the mass of emails to find the few relevant ones in the mix. If we could eliminate the "extra" time spent shifting through things and spend more quality time with working with vendors, I'd be all for it.

Question: *How much time do you deal with customers? How much time with other stakeholders?*

Vendor: (Claire) I feel as if it's 100% of my time, but that's because even when working on an approval plan or doing things behind the scenes, I still view that as customer-focused. 90% is probably more accurate. I'm answering email all day, every day. There is a huge part of my job that is very customer-service oriented. I spend a lot of my time doing training, helping with day to day issues, setting up/editing notifications, liaising between different departments, running reports, and soliciting advice and expertise from internal/non-customer facing colleagues.

(Ashley) All the time. We do have internal partners, but if it's your primary sales rep you're asking this question to, they are spending about 85%-90% working directly with libraries. I work directly with libraries, but I also spend a lot of time behind the scenes working with my team. Your primary rep also spends time with internal groups, on calls about new products/development or giving feedback from the field, but the expectation is to be in contact with libraries regularly and working to make sure our partnerships with libraries are productive, that they stay on top of new trends/products to let you know about them/find good

continued on page 20